

# **JFS Volunteer Connections Volunteer Handbook**



Guided by the wisdom and values of Jewish Tradition, Raleigh-Cary Jewish Family Services offers compassionate and affordable social services and programs to empower families and individuals of all ages to maximize the quality of their lives and reach their full potential with dignity, hope, and strength.

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## Volunteer Expectations and Responsibilities

Thank you for volunteering with Raleigh-Cary Jewish Family Services, a leading provider of human services in Wake County. Our volunteers are an integral part of our organization. They are encouraged to offer input regarding their assignments to the Volunteer Coordinator (VC). JFS treats our volunteers as equals to our paid staff, in terms of respect and confidentiality. In order to ensure a successful volunteer experience, it is important that you understand what you should expect from JFS and your responsibilities as a volunteer for Jewish Family Services.

### Definition of 'Volunteer'

JFS defines a 'Volunteer' as anyone who without compensation or expectation of compensation performs a task at the direction of and on behalf of our organization. JFS Volunteers are acting as representatives of our organization. JFS Volunteers must be officially accepted and enrolled by our organization prior to performance of a task.

### JFS Volunteer Assignments

Volunteers are assigned to areas chosen during the application process. If at any time, the volunteer is not satisfied with his/her assignment, they may contact the VC to request reassignment. Volunteer assignments are subject to review and possible removal if necessary.

### Expectations & Responsibilities:

#### Jewish Family Services will:

- Provide an orientation to the organization and its policies regarding volunteers, and appropriate training for your volunteer role.
- Provide you with safe and fulfilling assignments, in consideration of your skills and wishes.
- Provide you with regular reviews or evaluations of your performance; Provide you with guidance and support in your volunteer role.

#### JFS Volunteers will:

- Be punctual for your volunteer assignments.
- Be reliable and responsible.
- Communicate any issues or concerns which are likely to affect your volunteer duties;
- This includes disclosure of any legal infractions or pending charges.
- Be willing to learn and participate in orientation and at least 1 scheduled JFS Volunteer Connections Training event per year.
- Keep sensitive organization and client information confidential.
- Comply with the policies and procedures of Jewish Family Services.

## What Makes a Volunteer Effective?

- ✚ Flexibility
- ✚ Willingness to Learn
- ✚ Dependability
- ✚ Enthusiasm
- ✚ Resourcefulness
- ✚ Good Listening
- ✚ Patience
- ✚ Respect
- ✚ Sense of Humor

## Volunteer Connections - Policies and Procedures

Prior to volunteering with Raleigh-Cary Jewish Family Services, prospective volunteers will need to sign the JFS Volunteer Signature Forms. These forms can be obtained at time of volunteer orientation, via email document, or through DocuSign from JFS. These forms are as follows:

- ✓ Agency and Volunteer Agreement
- ✓ JFS Volunteer Confidentiality Statement and Compensation Policy
- ✓ Background Check Consent Form
- ✓ Photo and Name Release form
- ✓ [General JFS Guidelines](https://www.raleighcaryjfs.org/covid19-protocols)\*: <https://www.raleighcaryjfs.org/covid19-protocols>\*

\*This and other forms are also available on the [JFS Volunteer Connections Resource Page](#).

## Background Check Policy and Procedure

All JFS volunteer applicants are subject to a background check prior to being assigned. Prospective volunteers will need to sign a Background Check Consent form prior to any submissions.

Background checks are submitted through Sterling Volunteers. More information about Sterling Volunteers can be found at: <https://www.sterlingvolunteers.com/about/>

Conviction of a crime may not be an automatic bar to your volunteer eligibility. All circumstances will be considered in making a decision on your application. Raleigh-Cary Jewish Family Services will conduct subsequent background check updates through Sterling Volunteers each consecutive year from the date of signing the background consent



form. For volunteers under the age of 18, **no** background check will be performed but a parent or guardians signature is required.

## Volunteer Trainings/Orientations

- **Volunteer Orientation:** All JFS volunteers are required to attend an initial JFS volunteer orientation prior to any volunteer assignment. Additional orientations may be required based on the specific program the JFS volunteer has been assigned to.
- **Coffee Talk Sessions:** All JFS volunteers are to attend at least **one** Coffee Talk training sessions per year. These are offered twice a year at different times to accommodate volunteer schedules. These sessions are pivotal in furthering your education and volunteer experience with us.

## JFS Record Keeping: Volunteer “Connect” Entries:

All volunteer contact notes can be securely submitted through the Apricot Social Solutions Volunteer Connect Portal here: <https://jfsvolunteers.socialsolutionsportal.com/>

To ensure client confidentiality, the names of the care receivers should **not** be used in your volunteer contact notes or correspondence. Instead, use the client’s first and last initials.

The screenshot shows the 'Volunteer Timesheet' form in the JFS Connect portal. The form is titled 'Volunteer Timesheet' and is marked as '\*Required'. It includes the following fields:

- Main**
- Date of activity\***: A date picker field with the placeholder 'mm/dd/yyyy'.
- Time**: A time picker field with the placeholder '-- : -- am'.
- How long did you volunteer for? (whole hours here)**: A text input field.
- How long did you volunteer for? (decimals here, if applicable)**: A text input field.
- If a client was involve, how was this client served?**: A text input field.

The sidebar menu on the left includes: Dashboard, Form Submissions, ALL ASSIGNED FORMS, Volunteers (expanded), Upload File-Volunteers, and Volunteer Timesheet (highlighted).

### Example:

- Enter the date and time of your volunteer activity.
- Enter how long you volunteered for (whole hours and quarter hour entries- e.g. .50 = half an hour, .25 = 15 minutes)
- Client involved? If yes, select how.
- Select Volunteer Activity\*\*

\*\*If FV, Tele Outreach, Keshet Contact, Meal or Pantry delivery, or Tech Help, please note if contact is needed from a Social Worker or the Volunteer Coordinator.

- **Notes/Comments/Concerns:** Write a **brief note** describing your visit or other client contact. This is an opportunity to include information for the Volunteer Coordinator in case additional steps are needed from the VC or JFS Social Worker.

### **Examples of Client Contact Notes:**

Met with client at her home today. She seemed sad and discussed her daughter's cancelled visit. Client grew happier as she talked about upcoming holiday visits with her grandchildren.

Spoke with client by phone this afternoon. He talked about feeling bored and somewhat lonely. He wanted more interaction with others in the Jewish community. Informed him of an upcoming talk at the JCC.

### **Termination/Period of Probation Policy**

Raleigh-Cary Jewish Family Services may dismiss or place on probation a volunteer if he/she/they fail to fulfill the duties of the position and/or meet the basic standards of professionalism set by the organization and judged essential to its performance.

Grounds for immediate dismissal may include but are not limited to: misconduct or insubordination, being under the influence of substances while serving JFS in any capacity, theft of property or misuse of the organization's equipment or materials, verbal, physical or emotional abuse of JFS staff, volunteers, or its clients, not following up on an assignment and any breach of confidentiality.

### **Privacy and Confidentiality**

As a volunteer with our organization, you may have access to personal or protected health information pertaining to the people we serve. It is essential that volunteers observe, maintain and protect the privacy of those served by JFS. Please note that any and all information shared with you by a person we serve (verbal or recorded in any form), may be discussed with the JFS Volunteer Coordinator (VC) or a JFS Social Worker. The VC or JFS staff may provide you with additional guidelines specific to your volunteer assignment.

#### **What would confidentiality include?**

- Do not discuss confidential information with family, friends or clergy.
- Avoid discussing contacts, names, and circumstances in public places.
- You might talk in generalities about what you are doing and about the participants, volunteers and staff with whom you interact, but nothing that identifies a specific person or any details.
- It is not acceptable to presume that any personal information about any staff, board, volunteer, participant or general member is common knowledge (such as age, marital status, disability, etc.)
- Confidentiality restrictions apply even after you have stopped volunteering for JFS.



## Limits of confidentiality:

- When a client discloses intentions or a plan to harm another person.
- If a client states or suggests that he or she is abusing a child (or vulnerable adult) or has recently abused a child (or vulnerable adult), or a child (or vulnerable adult) is in danger of abuse.
- Mental Health care professionals are required to report admitted prenatal exposure to controlled substances that are potentially harmful.

Consistent with JFS policies, all employees and volunteers are responsible for protecting the security of all personal and protected health information that is obtained, handled, learned, heard, or viewed in the course of their work or their association with the JFS. Discussion regarding this information should not take place in public areas or in the presence of persons not entitled to such information.

## Incidents and Reporting

An incident is any event which presents a conflict of interest, danger, risk of danger, or harm or results in harm to a person being served, employee, volunteer, third party or causes damage or loss to property or assets. Examples of incidents include but are not limited to falls, motor vehicle accidents, injuries or medical emergencies. Volunteers involved in an incident are required to notify the JFS Volunteer Coordinator as soon as possible, or within 24 hours of an incident via phone call, [email](#), or completion of the secure online [Volunteer Incident Report](#).

JFS is committed to protecting our most vulnerable populations (children, older adults, and those with physical and mental disabilities). Any suspicion, allegation or confirmation of neglect, self-neglect, physical, emotional, financial or sexual abuse of an individual must be reported immediately to the Volunteer Coordinator.

## Complaints

A complaint is defined as an expression of dissatisfaction, made either verbally electronically or in writing, about agency services, personnel, or operations. Reports of dissatisfaction are a normal part of doing business and JFS encourages volunteers and all those being served who are not completely satisfied with their services to raise this as an issue with their service provider. It is the policy of JFS that all complaints receive a prompt, fair, professional and respectful review and response. All complaints, whether from those we serve, or the volunteer, can be forwarded to Limor Schwartz, Director of Jewish Family Services- 919-676-2295 ext. 120 or [Limor.Schwartz@shalomraleigh.org](mailto:Limor.Schwartz@shalomraleigh.org) .

## Conflict of Interest

A conflict of interest is defined as a situation in which a person is in a position to derive personal benefit from actions or decisions made in their official capacity. JFS requires all volunteers immediately disclose any business, commercial or financial interest where such interest might be considered as being in real, potential or apparent conflict with their official duties of Jewish Family Services. Any



volunteer that is deemed in a conflict-of-interest situation will be reviewed and it will be decided if continued connection in any form with JFS is allowable throughout or following the conflict.

## Professional Conduct

All services at JFS are provided in a holistic manner building on the strengths of those we serve and with their best interest in mind. It is the policy that all volunteers act in an ethical manner, consistent with the applicable codes of conduct. Volunteers should not take unfair advantage of any volunteer/person served relationships or exploit those being served to further their personal, political or business interests.

## Policy on Client/Volunteer Relationship

It is important that the JFS Volunteer remains professional within their volunteer role. Volunteers represent our organization and therefore may be given access to certain personal information of those we serve. In addition to complying with our confidentiality policy, the JFS volunteer must also refrain from entertaining, or encouraging any relationship outside of the client/volunteer relationship, unless otherwise addressed by included JFS staff.

## Multiculturalism/Anti-Racism

JFS will not discriminate against any volunteer, or applicant because of race, religion, color, sexual orientation or natural origin. Raleigh-Cary Jewish Family Services is committed to racial equality and equity and the elimination of racism. JFS programs seek to eliminate systemic barriers of full participation and promote positive race relations and attitudinal change. Discriminatory or racist incidents or behavior are not tolerated.

## Use of Substances

JFS volunteers are prohibited from the use, involvement, or abuse at any time of illegal drugs and/or alcohol while serving JFS in any capacity to the extent that it negatively affects Raleigh-Cary Jewish Family Services and those we serve.

## Sexual Harassment

Jewish Family Services will tolerate no sexual harassment of persons we serve, its volunteers or employees. Sexual harassment means unwelcomed sexual conduct, even if submitted to voluntarily, that is used as a basis for employment or volunteer decisions such as hiring, firing, or providing training or increasing pay which will affect an employee or volunteer, or unreasonably interferes with an employee or volunteer's job performance or creates an intimidating, hostile working environment even if no tangible or economic damages result.

## Social Media

JFS encourages social networking for the purpose of sharing ideas and experiences, providing information about the latest modes of care, ways to identify resources, and policy updates in health and human services. Be aware that where your JFS affiliation is identified, known, or presumed based on the posting, such postings represent the agency. As a JFS volunteer, you are encouraged to share your experiences; you may not however, use or disclose any client identifiable information of any kind in any social networking site or media. Even if an individual is not identified by name, if there is a reasonable basis to believe that the person could still be identified from that information, then its use or disclosure could constitute a violation of state and federal laws concerned with the protection and security of personal information.

## Policy on Gifts and Tips

There is never an expectation that JFS volunteers and clients will exchange gifts. However, we recognize that gift giving is an accepted way to express thanks and is a way to recognize a significant relationship. A “gift” in this context means any bestowal of money, any item of value, service, loan, thing or promise, discount or rebate for which something of equal or greater value is not exchanged. Over time, the volunteer’s relationship may feel more as a friendship to the client than as a volunteer, but because the *client remains a JFS client*, please remember that you are always volunteering, and some boundaries that ordinary friends do not have, must be maintained. This policy is written to guide you when presented with gifts or if you wish to give a gift to a client with whom you volunteer.

### Procedure

The giving and receiving of small tokens of respect, friendship and appreciation of reasonable value (e.g., a card, flower or snack) is a natural part of this kind of relationship and is acceptable. It is never appropriate to accept from or give to a client or client’s family a monetary or financial gift of any kind, such as tips, gratuities, cash, loans, securities, bequests, etc., or a gift of property. Volunteers should not give, solicit, or accept material gifts, the value which is in excess of \$10.00. Gifts or personal property are also inappropriate. You should notify the JFS Volunteer Coordinator immediately if a client offers you a gift in excess of \$10.00. You should resist the natural impulse to help the client financially, and neither offer nor agree to do so. Instead, advise him or her to work with Jewish Family Services to deal with the issue. You should also immediately report the information you receive to the JFS Volunteer Coordinator.

### How to Respond to the Client Who Offers an Inappropriate Gift

- Acknowledge that the client is offering the gift with the best of intentions and let him/her know that you value their appreciation.
- Tell the client you enjoy the time you spend together and that you get many intangible, but worthwhile benefits from volunteering with him/her.
- Make every effort to politely refuse or return a gift that is beyond permissible guidelines (i.e., more than a \$10.00 value).
- If a client prefers not to accept a similar gift that you have offered, you should graciously take it back.

- Explain to clients that you are volunteering without expectation of or desire for remuneration and that volunteers may not accept more than token gifts (i.e., more than a \$10.00 value), and never monetary gifts.

If the client insists on giving money, you may suggest that you would be very pleased if the client made a donation to JFS in your honor instead, which would benefit all the clients with whom JFS works.

If despite these explanations a client will not be satisfied until you accept the money or gift in excess of a \$10.00 value, please notify the JFS Volunteer Coordinator immediately and bring the item or money to the JFS office. There is no need to tell the client you are doing so.

## Volunteer's Limited Liability

Under **State of North Carolina statute 1-539.10**, a volunteer who performs services for a charitable organization or a volunteer engaged in providing emergency services is **not liable** in civil damages for any acts or omissions resulting in any injury, death, or loss to person or property arising from the volunteer services rendered if:

- (1) The volunteer was acting in good faith and the services rendered were reasonable under the circumstances; and
- (2) The acts or omissions do not amount to gross negligence, wanton conduct, or intentional wrongdoing.
- (3) The acts or omissions did not occur while the volunteer was operating or responsible for the operation of a motor vehicle.

Volunteers are also offered protection through the federal Volunteer Protection Act of 1997.

You were assigned to your project based on what we learned of your skills, talents, background and interests during the application process. Going outside the boundaries of your project as described in your project description, such as driving a client without being approved to do so, is generally not advised. This is for your protection because in doing so, you may lose your status as a volunteer and thereby have more liability under the law.

Primary financial responsibility for motor vehicle accidents rests with the vehicle's owner.

Authorized JFS volunteer drivers will carry usual and customary vehicle insurance.

(No less than 100/300)

## **JFS Volunteer Opportunities**

### **Jewish Community Service**

This part of our JFS Volunteer Program is vital to our growing Raleigh-Cary Jewish community. Community Service volunteers are introduced to countless opportunities to benefit not only themselves, but also those they assist. Open to volunteers of all ages desiring to give back to the community, but needing flexibility of schedule. Community Service opportunities may include support during JFS cultural and educational events, JCC and Jewish Federation events, Jewish community-wide events, and collections such as the annual Chanukah Gift Drive and the Interfaith Food Drive. Information about JFS and our services is distributed via JFS Literature Distribution Volunteers. These volunteers help distribute JFS literature, event flyers, and other necessary items to inform the community at various local congregations on a monthly basis.

### **Administrative Help**

Perhaps your talents lie in the area of organization. Raleigh-Cary Jewish Family Services welcomes your help. Volunteers are often needed to help in many ways that are so important in making our agency run smoothly. Federation agencies periodically need assistance with filings, mailings, data entry and phone work. This is an ideal volunteer opportunity for someone who has limited time but still wants to make an impact. Come put your talent to good use!

### **JFS Food Pantry**

Even within our small Jewish Community, families and individuals are in need of food. With your help, we strive to improve their quality of life with support. The JFS Food Pantry offers non-perishable Kosher and non-Kosher items and a limited amount of personal hygiene/toiletry items. JFS Volunteers help rotate stock and assemble food pantry bags for JFS clients facing food insecurity.

### **Mitzvah Meal and Food Pantry Delivery**

JFS Volunteers deliver prepared kosher-style Shabbat and Holiday meals, and prepared JFS Food Pantry bags to fellow community members experiencing financial insecurity or other hardship.



### **Intergenerational/Youth Opportunities**

Families can participate in, or lead Shabbat Services at local senior communities, provide a Shabbat Visit for a local senior, deliver Mitzvah Meals, participate in holiday projects and much more.

## Tech Support Outreach

Volunteers provide support to community members in need of guidance using devices such as laptops, smart phones, and tablets. JFS Volunteers are pivotal in the process of supporting our isolated community through the Tech Support Outreach Program, helping them navigate available online services and to communicate with family and friends through their devices.

## Religious Outreach

Religious Outreach Volunteers experience the rewards of sharing Jewish traditions with those who are unable to take part in the greater community, whether they are homebound, live in a secular community or are otherwise unable to attend Shabbat services at a local Congregation. These opportunities include:

- **Shabbat Services:** A JFS Volunteer invites seniors living in communities to attend Shabbat Services in-house on a monthly basis. (Open to all ages. JFS provides all necessary materials)
- **Shabbat Visiting:** JFS Volunteers plan special abbreviated Shabbat services in the comfort of the client's home. (Open to all ages. JFS provides all necessary materials)



## Friendly Visiting:

Volunteers are matched with home-bound, isolated seniors and build relationships through crafts, games, and conversation. Visits are typically once per week; forty-five to sixty minutes long. Virtual/Phone visits are another wonderful way to stay connected with your senior.

## Telephone Outreach Program:

This program provides a social connection through regular phone conversations with a fellow Jewish community member. Volunteers make weekly calls to seniors and act as a liaison between JFS and the senior. Even a regularly scheduled conversation with someone in our Jewish community can brighten a socially isolated senior's day!

## **JFSGO Transportation Services:**

Our volunteers drive Jewish seniors to various places in Wake County such as:

- Medical appointments and pharmacy visits
- Grocery Shopping
- Shabbat and Holiday Services
- Federation, JFS, and JCC events
- Local congregation events



*JFSGO is funded (in part) with a grant from Carolina Foundation for Jewish Seniors along with its commitment to enriching the lives of Jewish adults in North and South Carolina.*

## Specific Volunteer Programs Guidelines

### JFSGO Volunteer Transportation Guidelines

- Volunteer drivers must have a valid driver's license, insurance and registration. These must be present in the vehicle at all times.
- Always wear your seat belt and require the clients to wear theirs.
- Once you agree to transport a client the Volunteer Coordinator will give you the name and address of the person as well as confirm the appointment.
- The volunteer will need to contact the client prior to pick up to confirm that day.
- When you arrive at the location, please go to the door to pick up the client. Wearing your nametag, identify yourself and be ready to assist them as needed. The Volunteer Coordinator will inform you of any assistance needed beforehand.
  - JFS Volunteers are not trained to transport clients that use wheelchairs or have any disability that requires transfer assistance in and out of the vehicle. If at any time, you are assigned to a client that requires physical assistance, STOP, and contact the Volunteer Coordinator to be directed what to do.
- Allow enough time before appointments- it may take time to get the client into the car.
- Identify yourself to the receptionist when entering any doctor's appointments as the "Caregiver driver". Inquire how long the appointment will take.
- If the appointment you take them to is less than 30 minutes, please wait there. If it is longer, please arrange a time with the client to be back to pick them up based on the receptionist's information.
- Return the client where and when agreed upon. If the client requests additional stops, please feel free to let them know that they may call the office to arrange another trip for them.
- If you agree to drive for the next appointment, please let the Volunteer Coordinator know. JFS prefers that you do not give out your personal phone number.
- If you are unable to make an appointment, please call the Volunteer Coordinator as soon as possible





## JFS Visiting Programs Guidelines

*“Hiddur P’nai Zaken” – Enrich the lives of the elderly*

*“Kibud Av’v’Em” – Honor your father and mother*

These two Mitzvot or commandments capture the essence of what the Friendly Visitor Program is about. Through regular visits and phone contact, you can enrich the life of an older adult in our community.

Too often, aging is accompanied by alienation, loneliness and isolation – all of which can lead to debilitating depression. Reaching out to a frail elderly person in our community can provide a vital link. Just knowing that someone else cares about them can improve a person’s whole outlook on life.

Through the JFS Visiting Programs, volunteers will have the opportunity to engage in positive relationships, providing a connection for our isolated clients. As a Friendly Visitor and/or a Shabbat Visitor volunteer, you may feel rewarded by having a friend who truly needs and appreciates your companionship. At the same time, your visits will help a senior live their life as a respected, valued and cared for member of our community.

### **Friendly Visiting**

The Friendly Visitor Program matches a volunteer with an isolated older person. You will meet at least twice a month for 45 minutes to one hour per visit, and call during the weeks a visit cannot be made. During your visits, you will share life’s experiences, a game of cards, a program on TV, or just a few precious moments together. Even when an in-person visit cannot be made, the volunteer is encouraged to call the community member as even this call can provide a sense of community and lessen isolation in an older adult. The volunteer takes on a rewarding responsibility when entering into a relationship with an older friend. For many of these frail elderly, their visitor is their only personal contact all week.

### **Shabbat Visiting**

JFS Volunteers provide an abbreviated Shabbat service in the homes of local isolated seniors, bringing Shabbat celebration supplies, conversation, and a connection to the Jewish community. Often this is the only opportunity for our clients to connect with their faith and tradition.

Friendly and Shabbat Visitors brighten lives and serve as a vital link to the community and its resources. Being a friendly visitor is rewarding and, at times, can also be challenging. Please remember that JFS staff members are always available to support you.

### **General Description**

- Friendly and Shabbat Visitor volunteers provide comfort and friendship to the homebound, to those living in care facilities and to anyone who needs a friend.
- Visits will be arranged at the convenience of both giver and receiver of this service through the Volunteer Coordinator (VC).

## Responsibilities

- Friendly Visiting Program:
  - The VC will try to match people with similar interests and backgrounds.
  - JFS staff, including the VC will be responsible for evaluations and intakes, ensuring first and foremost the health and safety of the client before any volunteer is assigned.
  - The VC will coordinate the Friendly Visitor Introduction Visit. This will include both the VC and the Friendly Visitor at the client's home.
  - The Friendly Visitor and the person to be visited will confirm the date, time and place of all visits and, if possible, predetermine the length of the visit.
  - The Friendly Visitor will contact the client the day of their scheduled visit to confirm.
  - Have something planned: read a book or listen to one on tape and discuss; play cards or games. Taking a client to lunch, a museum, or walk in the park is not expected and is up to your discretion
  - The Friendly Visitor volunteer will communicate regularly via monthly submission of the Friendly Visitor Notes either through the online link (<https://www.raleighcaryjfs.org/volunteer-notes>) or via email submission to the VC ([tracy.bennett@shalomraleigh.org](mailto:tracy.bennett@shalomraleigh.org)). If there is an immediate concern, the volunteer will communicate immediately with the VC or other JFS staff person at 919-676-2295.
- Shabbat Visiting Program:
  - The VC will coordinate with the Shabbat Visitor volunteer and the client receiving the visit the date and time of the Shabbat Visit.
  - The VC will provide all needed supplies for the Shabbat Visitor for the visit.
  - The Shabbat Visitor volunteer will contact the VC if any supplies need to be replenished within 1 week of the scheduled visit when necessary.
  - The Shabbat Visitor Volunteer will arrive at the scheduled time and communicate with the VC if there are any immediate concerns for the client.

## Guidelines

- When you have been assigned to a friend, be sure you have some background information and a general understanding of what your commitment includes.
- The relationship with the person being visited is one that is caring and empathetic. It is the real heart of a Friendly and Shabbat Visitor experience. Points to keep in mind in the developing of a relationship are:
  - Schedule your visits on a regular basis. If you cannot make a scheduled visit, advise your friend as soon as possible.
  - If your friend cannot come to the door, knock and enter slowly with respect for privacy. Be careful not to cause alarm if the older person is sleeping or hearing impaired.

- Remember your goal in visiting. It is simply to be there; what's important is your presence. Don't worry about what to say or using the right words. Just share your interest and try to listen and understand.
- If you feel anxious or nervous about visiting, one way to handle this is to be open. You might say, "I feel a little nervous coming to see you. It's hard to know what to say." This kind of openness can ease tensions in both you and your friend.
- Keep in mind that you are there to visit and give assistance. The person is not there to make you feel better. Leave your personal feelings and worries at home.
- Do not overstay your visit. It is better to leave before the person shows signs of being tired. Your visit should last no more than one hour at most.
- **Be a good listener.** Let your friend lead in conversation. When listening, be patient, as you will often hear repeated what you have already heard. By asking questions, you may find you can help the person see the subject in a different light.
- Be genuinely interested in the person you visit. If he or she needs drawing out, encourage him or her to tell you about their past and family.
- Encourage expressions of feelings during discussion. Do not deny or avoid listening to and accepting negative feelings such as anger or depression. Your most helpful attitude will be one of empathy, caring and acceptance. Avoid such statements as, "Cheer up; things will get better." This only buries feelings and problems.
- **Do not take sides in personal problems.** Do let your friend tell you about them, real or imagined. **Do not offer advice, but suggest alternative decisions.** Most older persons can make their own best decisions.
- **Unless client expresses intent to commit suicide,** do not discourage talk about death. Allow your friend to express his or her thoughts and feelings on this most important topic.
- **Recognize signs of elder abuse.** (Reference pg. 8- Warning Signs an Older Person Needs Help)  
This can include:
  - Physical Abuse
  - Emotional/Psychological Abuse
  - Neglect or Abandonment by Caregivers
  - Financial Exploitation
- Having empathy is important, but details of your similar illnesses or operations are not always helpful.
- **Confidentiality is a must.** As a Friendly and Shabbat Visitor, you may be entrusted with information about private matters. Details about your friend, including the **name** of the person you visit, should not be used as conversation with others with the exception of JFS staff and VC.
- Be aware that you may become a very important person in the friend's life. Do not feel guilty about not visiting or serving your friend more than you have committed yourself to do. Your keeping of promises made and your real presence when visiting will make the relationship satisfying and meaningful to both of you.

- If at any time, you feel overwhelmed with your visits, please contact the VC to discuss. The VC does want to ensure all volunteers are comfortable with their assignments and is here to listen and to provide guidance and resources if needed.

## Policies and Procedures

- If you are going to be out of town or unavailable for a week or more, please let the VC know so other arrangements can be made for your client.
- Let your friend know your time commitment/limits. Ask the Volunteer Coordinator about other volunteers who may be able to assist with tasks you do not enjoy doing or those that exceed your physical capacity or time limits.
- Report to the Volunteer Coordinator any significant changes in your friend's condition or needs. The Coordinator is available for consultation regarding any special problems you may encounter at 919-676-2295 x124.
- Keep a log of your visits. It is important for us to record the volunteer hours of Jewish Family Services. (Please reference "client notes")
- Inform the Volunteer Coordinator about needs you may have for continuing education and training which will enhance your visitation.
- Tell others about the Friendly and Shabbat Visitor Programs. Spread the word that you enjoy your visits with your friend and that your commitment allows him/her to continue to feel he/she is a part of the community.
- For some people giving or receiving even the smallest gift places them in a position of obligation or establishes patterns that might interfere with the relationship. Volunteers should be careful to do nothing that might make the client more vulnerable in this regard. (Please reference 'Policy on Gifts and Tips')

## DOs and DON'Ts of Friendly and Shabbat Visiting

In order to build a positive rapport and friendship with a client, **please do**:

- Keep client and yourself healthy: use hand sanitizer just prior to entry of client's residence and after departure; visit only if you are well
- Share conversation, memories, interests
- Read aloud, write notes, help with personal correspondence
- Initiate handcrafts, play cards and other games (when applicable)
- Celebrate holidays and birthdays
- Listen without advising or criticizing
- Listen more than talk (try 70:30 rule)
- Keep visits to 45-60 minutes
- Schedule visits before or after meal periods
- Schedule next meeting before leaving client (when applicable)
- **Call if you cannot keep your appointment.** Also call before going to visit.

- Remember you are a friend, not a physician, attorney, social worker or business consultant. Offer support, but do not advise on these matters. Refer the friend to the Volunteer Coordinator or the Jewish Family Services office
- Reinforce volunteer parameters with client, as needed
- Offer JFS as contact agency. Client may leave messages with us.

In order to best protect a client and yourself, **please don't:**

- **Do not assist client if they fall;** if this occurs call 911 immediately
- Administer medications or offer medical advice
- Prepare or serve meals
- Take client for walks or drives\*\*
- Perform chores or maintenance work, or run errands
- Discuss or assist client with the handling of personal and/or private issues, such as banking or other finances, or funeral arrangements
- Monopolize the conversation
- Do not overstay your visit. Be alert to attention spans. End your visit before your friend becomes tired.
- Ask client for advice regarding volunteer's own personal grievances or issues
- Accept expensive or valuable gifts, or client's possessions (Please refer to "Policy on Gifts and Tips" section)
- Breach confidentiality
- Offer client your personal contact information- address, phone number- until a positive relationship has formed
- Don't assume the condition or mood you encounter on one visit will be the same on subsequent visits. Accept ups and downs in mood and behavior with patience, tact and understanding.

\*\*Unless you have been approved as a JFSGO Transportation Volunteer

### Friendly and Shabbat Visitor Points to Remember

Your primary responsibility is listening to your friend. If he/she brings up a problem, **do not try to solve it or provide specific help.**

YOU ARE NOT HELPING.

YOU ARE LISTENING

LISTENING IS HELPING!

**Consider all communication with the client/friend as confidential.** If you want to offer some action on behalf of the client, you must obtain his/her consent before undertaking that action yourself.

CONFIDENTIALITY AND CONSENT FOR SERVICES ARE ESSENTIAL

To enhance your experience as a Friendly Visitor, you need to develop certain minimal relationship-building and communication skills (we will help you). The ability to communicate warmth, openness and empathy are essential. Some relationship-building skills are:

- **Active Listening** – a response indicating you have heard accurately what the friend has said:
  - “You seem to be saying...”
  - “I hear you say...”
  - “Hmmm...”
- **Acceptance** – a response that accepts the friend’s feelings, ideas or values without judgment, regardless of his/her agreement with your values:
  - “You seem to be feeling...”
  - “It appears to really make you angry...”
- **Information Giving** – any communication of facts, without evaluation:
  - “Jewish Family Services has an Information and Referral Service...”
  - “We have a list at the office of residential homes...”
- **Nonverbal Cues** – the combination of nonverbal cues and the words a person uses comprise the total message sent. When a person’s nonverbal cues are congruent with the words said, the listener usually “feels” that the speaker is being honest. When a speaker’s nonverbal cues and words are not congruent, the listener is likely to experience some discomfort – even though uncertain of what is wrong. Sometimes a person’s nonverbal cues will completely change the meaning of the words spoken. The following is a list of nonverbal behaviors which are very significant in communication: position in relation to the listener, direction of gaze, eyebrow movement, eyelid position, position of head, feet, hands, body, movement of hands, change in skin color or voice pitch, volume, rhythm and tempo. Often the speaker is unaware of this body language and its meaning to others. When words and body language seem congruent, a simple sort of response is to use the nonverbal referent almost as a special variation of or as part of reflection of feeling. This is very useful when someone is not talking. The listener does not interpret the meaning of these behaviors. Examples:
  - CL: “I don’t know what’s wrong. I should be happy.”  
Visitor: “You have tears in your eyes right now.”
  - CL: “I’m really happy right now.”  
Visitor: “You’re smiling.”
- **Referrals** – as a Friendly and Shabbat Visitor, you need to be alert and sensitive to what is going on with your friend and his/her environment. Note such things as:

*A beneficiary agency of The Jewish Federation of Raleigh-Cary*

- Is the house clean and neat?
- Does there seem to be food in the house?
- Is your friend's appearance neat and clean?
- Are there lesions, skin breakout, etc.?

If you have a concern, do not handle it yourself or suggest available resources. Bring all such concerns to the attention of the JFS Volunteer coordinator.

Remember: Whatever you give to this experience,  
WARMTH, CARING, INTEREST AND KINDNESS  
Is truly a *mitzvah*.

## How to Tell When You Are Too Involved

You are too involved when you notice one or more of the following things happening:

- You find yourself feeling possessive of your friend.
- You find yourself dreaming of your friend and wake up with him/her on your mind in a troubled way.
- You are unable to get him/her off your mind.
- You are distracted at home and find yourself wanting to talk about your friend a lot of the time.
- You realize you are losing patience with those people who tell you their troubles when, you think, they have no problems compared to your friend.
- You find yourself saying "That could be me," often followed by increased attempts to convince yourself that your friend will get well.
- You identify strongly with your friend's age, family status, disease, etc. to the point that you are dwelling on them.

## Relief for Over-involvement

- Speak to the JFS Volunteer Coordinator.
- Take time off – do not visit your friend for a while.
- Talk about it – raising it to the conscious level.
- Knowing when you are getting close to reaching your limits and work on accepting them; be able to say, "I know I can't work with X because I have trouble dealing with this kind of situation."
- Remember, YOU ARE NOT ALONE. We must try to be ready to listen to what is going on inside of us. Support is on the way.

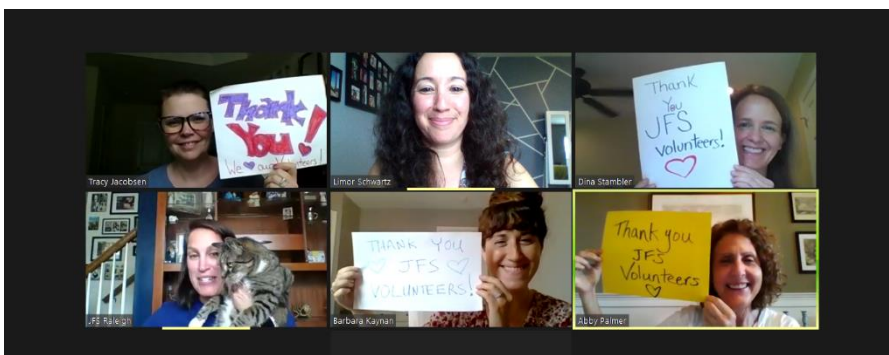


It is always a good idea to contact your JFS Volunteer Coordinator should you have any concerns about your Friendly and Shabbat Visiting client.

## Warning Signs an Older Person May Need Help

- Change in eating habits – weight loss, appetite loss, or missed meals
- Neglecting personal hygiene – clothing, body odor, oral health, nails, skin
- Neglecting the home – change in tidiness &/or sanitation
- Exhibiting inappropriate behavior – being unusually loud, quiet, paranoid or agitated
- Changing relationship patterns – friends and neighbors express concern
- Physical injuries – burns, bruises
- No longer participating in activities that were once enjoyable
- Exhibiting forgetfulness – unopened mail, newspaper piles, missed appointments
- Mishandling finances – not paying bills, losing or hiding money
- Making unusual purchases – entering large number of contests, purchases from TV ads

Source: U. S. Department of Health and Human Services



Thank you for volunteering with JFS!  
Questions? Contact Tracy Jacobsen,  
JFS Volunteer Coordinator at 919-  
676-2295 x124 or  
[Tracy.Jacobsen@Shalomraleigh.org](mailto:Tracy.Jacobsen@Shalomraleigh.org)